

# **Real Estate CRM Scope of Work**

**To Charitra Realty Pvt. Ltd.**

## **Business Requirement Document Real Estate Business**

Call 4 Web

By Rajat

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### **Project overview:**

In this document we create a Portal or dashboard that includes advanced search filters and a heads-up display feature for Real estate business portal. The functionality we will create includes advanced search filters and a heads-up display feature. This advanced search filters allow agents to narrow down their search by specifying the type of property, location, price range, and other criteria. This functionality will design to help your agents quickly find the properties that meet their specific needs and preferences, while also saving them time and effort in the process. We ensure that users have access to the most up-to-date and accurate information.

**This vision is given by Mr. Rishabh Sir to Rajat (Business Analyst).**

## Scope of the Project:

- We are creating a comprehensive portal or dashboard that will allow agents to easily enter data for property leads (Purchase and Sales both) in the form of detailed forms.
- This portal should allow for the details filled in by agents to be displayed in real-time on a live dashboard accessible to every agent.
- However, the agent has requested that this portal only display information relating to leads and not include any contact information of the client.

## Working Process

- **For Admin Panel:**
- **Login Page with Forgot Password option:**
  1. We will include a Login Page with Forgot Password feature to ensure that you can have a secure access to the system.
  2. User will get OTP to forgot password.
- **User Listing/ User create (Agent):**
  1. Moreover, a User Listing/ Create User feature will be added to manage the creation of new users with ease. This feature will enable the administration to control user access and effectively maintain user records.

- **All Reports with all filters according to the requirements:**
  1. Additionally, we will incorporate a Reports section with different filters, that are strategically placed to assist with data analysis. With this, admin have the ability to filter data based on various criteria to access more accurate information.
- **For User Panel:**
- **Login Page with Forgot Password option:**
  1. We will include a Login Page with Forgot Password feature to ensure that you can have a secure access to the system.
  2. User will get OTP to forgot password.
- **Live Data are shown from the database:**
  1. The platform will display the live data which has been uploaded by other agents. This feature ensures that you are always up-to-date with the latest information and can make better decisions based on real-time data.
- **Form with different fields.**
  1. We will create a form with different fields to make it easier for you to upload relevant data to the platform. This form has been optimized to ensure the process is smooth, quick, and efficient, and you can be confident that your data will be securely stored on our platform.

- **There are some limited fields to be write in forms:**

- 1.Full and last name
- 2.Sector
- 3.State
- 4.Purpose (To Sell and Buy)
- 5.Asking (In lakhs and crores)
- 6.Property type (Residential/ Commercial/ Plot)
- 7.Size (Square fit/ Square yard)
- 8.Comments if any
- 9.Agent Name
- 10.Phone number (which will not show in live portal to everyone but to be filled in)

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**RAJAT KUMAWAT (BUSINESS ANALYST)**